



Bringing people closer to Jesus Christ through His Church  
Catholic Diocese of Portsmouth

Bringing people closer to Jesus Christ through His Church  
Catholic Diocese of Portsmouth



# Diocesan Operating Procedures Diocesan Archives Charges (003)

*"For whatever was written in former days  
was written for our instruction"*

*Romans 15:04*

Issued by:

The Bishop of Portsmouth and the Trustees of the Portsmouth Diocesan Trust  
St Edmund House  
Bishop Crispian Way  
Portsmouth PO1 3QA

Registered Charity No. 246871





## Contents

<b>Collecting</b> .....	Error! Bookmark not defined.
<b>1. INTRODUCTION</b> .....	<b>2</b>
<b>2. FOREWORD</b> .....	<b>3</b>
<b>3. TERMINOLOGY</b> .....	<b>4</b>
<b>4. THE BISHOP'S VISION</b> .....	<b>5</b>
<b>5. APPROVALS</b> .....	<b>6</b>
<b>6. AMENDMENT RECORD</b> .....	<b>6</b>
<b>7. COLLECTING POLICY (001)</b> .....	<b>7</b>
<b>8. SUMMARY</b> .....	<b>7</b>
<b>9. INTRODUCTION AND PURPOSE</b> .....	<b>7</b>
<b>10. SCOPE</b> .....	<b>8</b>
<b>11. COLLECTING CRITERIA</b> .....	Error! Bookmark not defined.
<b>12. EXCLUSIONS</b> .....	Error! Bookmark not defined.
<b>13. METHODS OF ACQUISITION</b> .....	Error! Bookmark not defined.
<b>14. CONDITIONS OF ACQUISITION: DIOCESAN DEPOSITS</b> .....	Error! Bookmark not defined.
<b>15. SELECTION AND DEACCESSIONING</b> .....	Error! Bookmark not defined.
<b>16. ROLES AND RESPONSIBILITIES</b> .....	<b>8</b>
<b>17. TRAINING</b> .....	<b>9</b>
<b>18. REVIEW</b> .....	<b>9</b>



## 1. INTRODUCTION

The Diocesan People Operating Procedures (DOPs) are provided as guidance to managers and to employees on how a wide range of issues should be managed in relation to the Diocesan Archives.

The underlying rationale to DOPs is to provide a framework of policies and procedures which provide a way of working within the concept of fairness and justice.

It also provides employees, volunteers and line managers with relevant forms, letters, and documents in a series of appendices for use in the appropriate circumstances.

**Policies** provide general and practical advice as well as guidance on a range of issues to ensure all employees (and volunteers) act appropriately as required by the Diocese and in adherence to relevant legislation.

**Procedures** support and supplement the policies by giving a step- by-step account of specific arrangements that apply in particular circumstances.

**Forms and Guidance notes** are also provided throughout relating to the policies and procedures.

**Please note that these policies and the accompanying procedures and forms are for guidance only. They do not have contractual status as they may be amended from time to time.**



## 2. FOREWORD

God's Church here in the Catholic Diocese of Portsmouth is formed of many and varied communities, held together in the same Truth of Christ both in doctrine life and worship. We need common operating procedures across the Diocese to ensure compliance with the needs of both canon and civil law. In addition, and especially in the light of the church's call to the work of new evangelisation, we need to ensure harmonised collaboration. We have a responsibility to ensure that people, buildings, and money are treated carefully allowing us to perform our duties "with the diligence of a good householder" (Canon 1284§1).

These Diocesan Operating Procedures (DOPs) have the status of particular law for the Catholic Diocese of Portsmouth. They must be understood and followed in the broad areas of human resource, schools, buildings, and finance.

I am very grateful to all those who have compiled these procedures and ensure their regular review and updating.

In Corde Iesu

+Bishop Egan  
Bishop of Portsmouth



### 3. TERMINOLOGY

Throughout this DoPs, the Portsmouth Roman Catholic Diocese will be referred to as **'the Diocese'**. This expression shall include any representative acting for or on behalf of the Diocese Trustees, for example HR, Line Managers or any other representative appointed to carry out work on behalf of The Portsmouth Roman Catholic Diocese.

Throughout this DOP the expression, **'Line Manager'**, will be used which may be referring to a Co-ordinating Pastor/Parish Priest/Head of Department or any other person with line management responsibilities.

Throughout this DoP the expression, **'Diocesan Archivist'**, refers to the member of staff or volunteer responsible for the management of the Diocesan Archives.

This DOP is subject to changes brought about by relevant legislation, regulations and changes in best practice. Any changes and amendments that may be made to this document will be brought to the attention of line managers and Parishes. They will then be guided towards the current version online:

[Diocesan Operating Procedures | Portsmouth Diocese](#)

Guidance on is available from the relevant department in the Curia:  
[archives@portsmouthdiocese.org.uk](mailto:archives@portsmouthdiocese.org.uk)



#### **4. THE BISHOP'S VISION**

The Bishop of Portsmouth and the Trustees are fully aware of their duty of care to all our employees, and to anyone who works within the Catholic Diocese of Portsmouth.

Diocesan policies must comply fully with the current statutory regulations concerning employment, data protection, health and safety and the many regulations which relate to employees and to the workplace.

However, it is our aim that our policies do more than comply with regulations.

It is our aim that our policies provide a framework of guidance for all who work within the Diocese: guidance to support and encourage us all in our work, to enable a working environment that is based on co-operation, respect for each other's gifts, tolerance and support for each other's limitations and above all, fairness and justice in our dealings with each other.

Please read these policies, become familiar with the procedures and the forms, and help us to ensure that our work together fulfils our aims of respect, tolerance, and fairness.



## 5. APPROVALS

The signatures below certify that this document has been reviewed and accepted demonstrating that the signatories are aware of all requirements contained herein and are committed to ensuring their provision.

	Name	Signature	Position	Date
Prepared by	Eleanor Belton		Development Officer	25 Aug 21
Reviewed by	Heather Hauschild		Chief Operating Officer	27 Oct 21
Reviewed by			FAR Committee	10 Nov 21
Approved by			Trustee Board	09 Dec 21

## 6. AMENDMENT RECORD

This document is reviewed to ensure its continuing relevance to the systems and processes that it describes. A record of contextual additions or omissions is given below.

Page No.	Context	Revision	Date

## 7. CHARGES POLICY (003)

*"A diocesan bishop is also to take care that there is an historical archive in the diocese and that documents having historical value are diligently protected and systematically ordered in it". Can. 491 §2*

## 8. SUMMARY

<b>Operative Date:</b>	December 2021
<b>Owner:</b>	Governance Manager
<b>Review Date</b>	December 2024
<b>For action by:</b>	All users of the Diocesan Archive.
<b>Policy Statement:</b>	This policy outlines the charges associated with the Diocesan Archive.
<b>Responsibility for dissemination to new employees:</b>	Line managers
<b>Mechanisms for dissemination:</b>	The policy will be published on the Diocese of Portsmouth website and promoted to employees, volunteers, and parishes through the e-newsletter.
<b>Training Implications:</b>	This policy will be highlighted through the induction process.
<b>Resource Implications:</b>	There are resource implications.

## 9. INTRODUCTION AND PURPOSE

- 9.1. The Portsmouth Diocesan Archives are held by a data management company on behalf of the Diocese. The Archive holds episcopal and administrative records of the Diocese of Portsmouth from its foundation in 1882.
- 9.2. The data management company charges for its services including collecting and retrieving material.
- 9.3. The Diocesan Archives cover the cost of storing material out of the budget.
- 9.4. The cost of depositing new materials must be borne by the party making the deposit; please refer to the Diocesan Archives Collecting Policy (001) for more detail.
- 9.5. The cost of retrieving material for consultation must be borne by the party making the enquiry, please refer to the Diocesan Archives Access Policy (002)

for more detail.

- 9.6. The purpose of the Charges Policy is to outline the charges associated with the Diocesan Archives.

## 10. SCOPE

- 10.1. The Collecting Policy applies to all users, depositors, volunteers and staff of the Diocesan Archives.

## 11. TABLE OF CHARGES

Service	Includes	Charge
Deposit	Box, cataloguing and collection	Varies
Unsuccessful search		£2.00
Record Retrieval	Search delivery and return	Varies
Photocopies (A4)	Up to 5 images	£0.50
Photocopies (A4)	Additional images	£0.20 each
Photocopies (A3)	Each	£0.50 each
Digital Image	Up to 5 scans or photographs	Free (excludes record retrieval)
Digital image	Additional images	
Postage		Varies
Publishing	Academic/non-profit works	Guide price: up to £30 per image, prices will be decided on a case-by-case basis
Publishing	Commercial Works	Guide price: £60 per image. For works which will make a large profit, a higher fee may be charged.

- 1.1. Certain deposits may incur an additional charge, e.g. if they will need to be stored in a tube. Please consult the Diocesan Archivist for further detail.
- 1.2. If multiple boxes are being deposited or retrieved, discounts may be applied. Please consult the Diocesan Archivist for further detail.
- 1.3. Delivery is normally next working day, other options may be available. Please consult the Diocesan Archivist for further detail.

## 12. PAYMENTS

- 12.1. Payments from Diocesan departments, committees, or bodies making a deposit or record request will be coded against their budget.
- 12.2. Payments from Diocesan parishes making a deposit or record request will be settled through their month-end accounts.
- 12.3. External parties making a record request will be sent an invoice with the payment details.



### **13. ROLES AND RESPONSIBILITIES**

13.1. It is the responsibility of all users of the Diocesan Archives to:

- 13.1.1. Have read and understood the Diocesan Archives DoPs
- 13.1.2. Meet the costs outlined in the Charges Policy for the service they require

13.2. It is the responsibility of the Diocesan Archivist to:

- 13.2.1. Ensure that users of the Diocesan Archives are aware of the DoPs and charges
- 13.2.2. Ensure that payment has been received prior to accepting a deposit or requesting a record retrieval
- 13.2.3. Ensure that a receipt of payment is provided
- 13.2.4. Ensure that payments are clearly recorded in the accounts

### **14. TRAINING**

14.1. No specific training is required in relation to this policy.

### **15. REVIEW**

15.1. This document may be reviewed at any time at the request of either the staff or management, or in response to changes in legislation, but will automatically be reviewed after three years.